

CASE MANAGEMENT/ISS DRAFT AGENDA SEATTLE, WA October 8 – 11

Introduction: This three and a half day workshop will combine site visits, content sessions and hands-on activities which will train staff on developing a good case management system that utilizes the ISS (Individual Service Strategy) as a road map to move young people through a continuum of appropriate services/activities that address their individual needs. This workshop will go beyond the documentation included in a case file and will look at quality and content. Workshop participants will learn how to set goals, monitor, and review ISP. Emphasis will be placed on how to involve the young person in the development and implementation of his/her own plan with the case manager serving as more of a coach to the process.

Intended Audience: Since this workshop will be held twice, once on the East Coast and once on the West Coast, each site may send two people. It is recommended that for this to be an effective training, that each site send their lead case manager as well as someone who oversees the system.

Participants are asked to bring:

- A sample of the Individual Service Plan that they are currently using
- Examples of Assessment Tools
- A few representative case files (with names blacked out) for peer review
- Three major challenges that they have faced or are facing in developing a case management system **NOTE: THESE ARE DUE TO ANNE STOM BY FRIDAY, SEPTEMBER 13, 2002. Please e-mail to astom@doleta.gov or fax to 202/693-3113**
- Examples of things that are working well

Presenters: Anne Adams, Sundra Franklin, Evan Rosenberg, Anne Stom, Rebecca Taylor

Hotel: The Elliott, a Grand Hyatt Hotel
721 Pine Street
Seattle, WA
206/774-1234

DAY 1: Tuesday, October 8 – Seattle

LOCATION: AT HOTEL

8:00 Continental Breakfast at the Hotel

8:30 Introductions and overview of the workshop – Anne Stom

9:00 – 9:45 **Session 1: Principles & Practices of Youth Development:** (Anne Stom/Sundra Franklin)
Description: Guiding adolescents successfully through the transition to young adulthood.

9:45 – 10:30 Group activity: Assessing how the principles and practices of youth development are embodied at your site. Matching activities available through your program to the needs of the youth that you are serving.

10:30 – 10:45 Morning Break

- 10:45 – 12:00 **Session 2: Understanding Success in Youth Development Systems** – Evan Rosenberg
 Description: The integration between case management and performance, particularly around goal setting and achievement-oriented outcomes. The outcomes are around the success of youth. This session will define what success is and is not (i.e., Success doesn't mean solving youth's problems) This session will include a built-in activity session on how to set goals that relate to youth development activities (i.e., short term occupational training)
- 12:00 – 1:30 Lunch on your own
- 1:30 Leave hotel for Site Visit
- 2:00 – 5:00 Site Visit; see attached itinerary for site visit specifics
- 5:00 – 5:30 On the Bus: Review of the day and next day overview

DAY 2: Wednesday, October 9, Seattle

LOCATION: AT THE HOTEL

8:00 – 8:30 Continental Breakfast at Hotel

- 8:30 – 9:15 **Session 3: Overview of the BI-LEVEL Approach** – Anne Adams
 Description: This session will describe the development of a case management system that is designed to assist the individual youth through self-discovery, self-planning, and self-monitoring but also deliver the performance objectives of the grant. Bi-Level Case Management is a method of managing client services so that all organizations serving the same clients are integrated and focused on client issues – often requires “new ways of thinking and new ways of doing” to ensure a highly accountable system of opportunities and supports for young people.
- 9:15 – 10:00 Group Activity
- 10:00 – 10:15 Break
- 10:15 – 11:15 **Session 4: Assessment: The Foundation of Case Management - Rebecca Taylor**
 Description: This session will focus on a variety of assessment tools that can assist case managers in developing an effective individual service plan. Topics will include interviewing techniques to elicit better data and involve youth in both assessment and planning, informal, and formal assessment activities and instruments, and principles of good assessment.
- 11:15 – 12:00 Group Activity: Analyzing the assessment tools that people are using at their sites.
NOTE: THIS IS WHERE WE WILL BE USING THE ASSESSMENT TOOLS THAT FOLKS HAVE BEEN ASKED TO BRING WITH THEM.
- 12:00 – 1:30 LUNCH ON YOUR OWN

- 1:30 – 2:15 *Session 5: **Resource & Linkage** – Anne Adams*
 Description: This session will focus on supporting youth through the utilization of existing, appropriate resources. To make sure that all of the youth serving organizations within a community are being utilized and also, to discuss ways of guaranteeing that youth are linked to those services in conjunction with the ISS and not simply referred to services. This session will also discuss the implications of resources and linkages on sustainability.
- 2:15 – 3:00 Group Activity: Resource Mapping
- 3:00 – 3:15 Afternoon Break
- 3:15 – 4:00 *Session 6: **Case Planning** – Rebecca Taylor*
 Description: This session will focus on the components of a comprehensive case plan, developing individual ownership and responsibility for the plan, and sample ISS forms.
- 4:15 – 5:00 Group Activity – Developing a process for consistent and on-going case management; critique case files. **NOTE: THIS IS WHERE WE WILL BE USING THE ASSESSMENT TOOLS THAT FOLKS HAVE BEEN ASKED TO BRING WITH THEM .**

DAY 3 Thursday, October 10, Seattle

LOCATION: Metro Center YMCA

909 4th Avenue, 1st Floor
 Seattle, WA 98104

The Metro Center YMCA is located approximately 9 blocks from the hotel. There is a free bus service in the downtown area, which will take you from the hotel to the YMCA.

BREAKFAST ON YOUR OWN

- 9:00 – 9:45 *Session 7: **Implementing the Case Plan** – Sundra Franklin*
 Description: Case Management as a Team Process; involving youth in process; linking E-Teams and other data systems to the process of planning
- 9:45 – 10:30 Group Activity: Working through the process of strategically planning for 2 – 3 goals
- 10:30 – 10:45 Break
- 10:45 – 11:30 *Session 8: **Record Keeping** - Sundra Franklin*
 Description: Topics covered will include documentation of individual progress and project goals; on-going assessment; case notes; case folders; and effective management of case loads. This session will also cover the necessity for regular review and modifications to the plans.
- 11:30 – 12:15 Group Activity
- 12:15 – 1:30 NETWORKING LUNCH provided at YMCA

1:30 – 3:00 *Session 9: **Using the MIS System as a Tool to Achieve Goals** – Evan Rosenberg*
Description: How data and information is used at the case manager level to ensure success. Understanding your local “pipeline”. Every case manager should be able to figure where their kids are at any time using the data.

3:00 – 3:15 Afternoon Break

3:15 – 5:00 E-TEAMS Demonstration/Analysis

DAY 4 Friday, October 11, Seattle

LOCATION: Metro Center YMCA
909 4th Avenue, 1st Floor
Seattle, WA 98104

BREAKFAST ON YOUR OWN

Note this session is starting ½ hour later to allow for people to check out of the hotel BEFORE they come to the session.

9:30 – 10:30 *Session 10: **Taking It Home** – How to use the information from this training at your site. What piece can you take home and implement? What piece can you explain to your colleagues? How can you develop a persuasive briefing for your Project Director?*

10:30 – Noon **Case Study Reviews**

Participants will receive:

- Case Management Manual
- A matrix for mapping activities that are occurring at sites to the Performance Measures youth development activities.
- A manual on preparing ISS's by Jim Callahan
- A manual on assessment “ Paper & Process” by Jim Callahan